

Yellow Task Web System User Guide

Background

In 1999 the specific requests for information, cost estimates, and directed action from the National Cancer Institute (NCI) was formalized into the Yellow Task System. This system was established within Leidos Biomedical Research Inc. (Leidos Biomed), formerly SAIC- Frederick Inc., as a formal approval system.

In conjunction with the National Cancer Institute and Computer Statistical Services, Leidos Biomedical Research Inc. transformed the manual Yellow Task System to an electronic web based system in 2003. This system has been designed to create a more efficient and expedient mechanism to request services and obtain approval.

Purpose

This guide is intended to steer users of the Yellow Task System through the process of submitting a request for services from Leidos Biomedical Research Inc. The guide explains the procedures of the web-based system for new users as well as repeat users. A flowchart is included to illustrate the flow process of a request. Task responsibilities within the system are referenced by the position. Contact information for participants can be found below.

Comments on the system can be forwarded to the Leidos Biomed Yellow Task Coordinator at burgeg@mail.nih.gov.

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Types of requests

Service request types include but are not limited to the following:

- Clinical Monitoring Support: Behavioral Sciences, Clinical Administration, Project Management, Clinical Support, Clinical Trials Management, IRB-DSMB, Protocol Navigation, Programmatic Support
- Laboratory Services: Staffing, Subcontracts
- Animal Services: Animal holding, Colony expansion by IVF, Technical staff support
- Project/program support: Research lab support, Procurement/finance support
- Support Resources: Subcontracts, Acquisitions, Information Management, Administrative

Contact information

The following individuals are participants in the Yellow Task process. For questions regarding the Yellow Task System and the process of information, please contact the Leidos Biomedical Research Inc. Yellow Task Coordinator at burgeg@mail.nih.gov or 301-228-4543.

NCI-Frederick Contacts

Contracting Officer Technical Representative		
Craig Reynolds	reynoldc@mail.nih.gov	301-846-1302
Contracting Officer		
Stephen Davis	stephen.davis2@nih.gov	301-846-1112
Facility Administrator		
Debbie Guy	guyde@mail.nih.gov	301-846-1106
Altia Sherman	shermaal@mail.nih.gov	301-846-1214

Leidos Biomedical Research Inc. Contacts

Chief Administrative Officer		
David Bufter	bufterd@mail.nih.gov	301-846-1086
Yellow Task Coordinator	burgeg@mail.nih.gov	301-228-4543

Severable vs. Non-Severable services

Severable Services

Services that are routine, repetitious and continuous are considered severable services. These services are recurring in nature—such as IT repair or security services—where an agency realizes a benefit at the time services are provided even if the contract has not been performed to completion.

If the task, service, or deliverable is expected to be fully completed (committed or expended) within 12 months of being added to the contract it can be considered severable. However, it is possible for some projects to take longer than 12 months but, segments or milestones reached in 12 months or less will still have commensurate value for the shorter periods. Accordingly, these projects can be considered severable. In either case no more than 12 months worth of funds can be added to the contract.

Examples:

Data collection where the value of the data is received as collected, Medical or Lab staff (FTE), IT repair, helpdesk, or support

Severable services are funded by annual appropriations. Each annual allotment of funds must be expended within 12 months of the date of obligation. Any funds remaining after that time must be de-obligated.

Non-severable (or “entire”) Services

Services that produce a single or unified outcome that cannot feasibly be subdivided into separate performance outputs each fiscal year (such as a report from a research project that will not be presented until the next fiscal year). If you pay for a final finished product and would get little or no value if the contract was terminated before completion, it is a non-severable service contract. The contract normally requires the contractor to complete and deliver the specified end product (e.g., a final report of research accomplishing the goal or target).

Non-severable projects therefore must be fully funded to cover their entire duration when placed on the contract, or phases within those projects must be identified and fully funded within that project. You will therefore need to specifically identify them in your funding request and include full funding at that time to carry the projects through completion.

Examples:

Clinical Trials and associated Recruitment and Coordinating Centers, Data collection, Data analysis contracts, Vaccine or drug efficacy studies, Consultant study conducted over several months, Basic research that advances science, IT/software development, Statistical, Analytical, Evaluation services

NOTE: Funding of ongoing OTS services would be subject to an EAC spend analysis to ensure that funding levels are proportional to the rate of expenditure. Funding of YT projects would be

dependent upon whether they are identified as severable or non-severable tasks. Also, keep in mind that under the YT process, Leidos Biomed will develop an estimated budget for each of these projects in conjunction with the program office. Projects not advancing after six months, i.e., no yellow task initiated, will be returned to the project office, or, the Cost Center may be removed and the funds spent for general OTS activities.

MOSB Points of Contract:

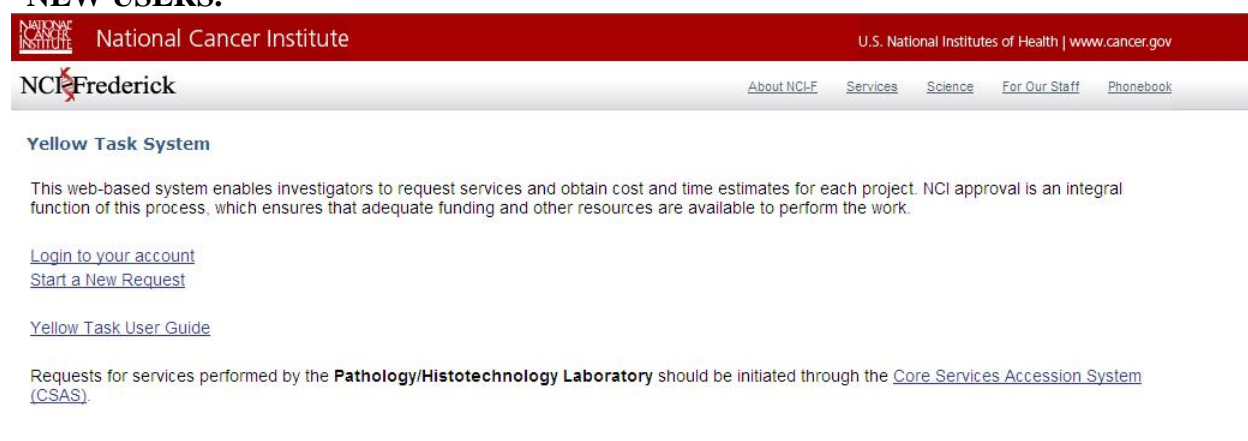
Stephen Davis: 301-846-1112 stephen.davis2@nih.gov

Request Initiation

To initiate a request visit the following web site:

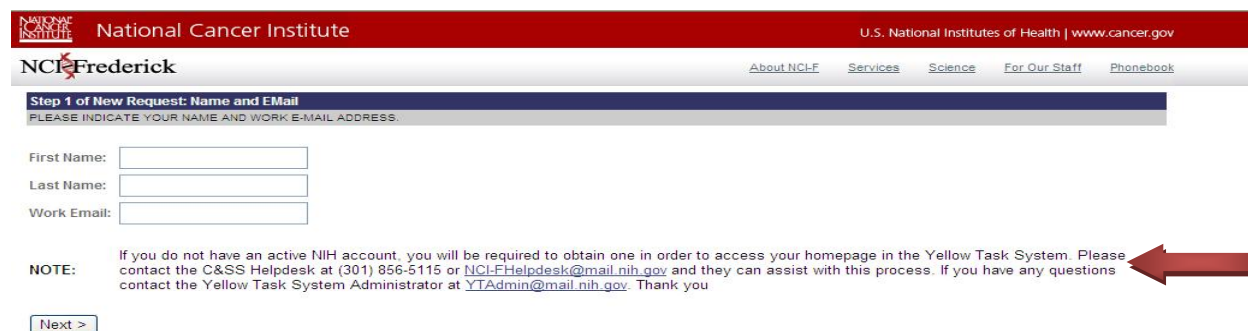
<http://ncifrederick.cancer.gov/campus/yellowtask/>

Figure 1 - This screen is applicable for all new users. **For repeat users, please follow the instructions for “REPEAT USERS”. For all other users, please follow the instructions for “NEW USERS.”**



The screenshot shows the NCI Frederick Yellow Task System homepage. At the top is a red header with the NCI logo and 'National Cancer Institute' on the left, and 'U.S. National Institutes of Health | www.cancer.gov' on the right. Below the header is a navigation bar with 'NCI Frederick' on the left and links for 'About NCI-F', 'Services', 'Science', 'For Our Staff', and 'Phonebook' on the right. The main content area is titled 'Yellow Task System' and contains a paragraph explaining the system's purpose. Below this are links for 'Login to your account', 'Start a New Request', and 'Yellow Task User Guide'. At the bottom, a note states that requests for services performed by the Pathology/Histotechnology Laboratory should be initiated through the Core Services Accession System (CSAS).

New User



The screenshot shows the 'New User' registration form. At the top is a red header with the NCI logo and 'National Cancer Institute' on the left, and 'U.S. National Institutes of Health | www.cancer.gov' on the right. Below the header is a navigation bar with 'NCI Frederick' on the left and links for 'About NCI-F', 'Services', 'Science', 'For Our Staff', and 'Phonebook' on the right. The main content area is titled 'Step 1 of New Request: Name and Email' and contains a sub-header 'PLEASE INDICATE YOUR NAME AND WORK E-MAIL ADDRESS.' Below this are three input fields for 'First Name:', 'Last Name:', and 'Work Email:'. A 'NOTE:' section follows, stating that if the user does not have an active NIH account, they will be required to obtain one to access their homepage in the Yellow Task System. It provides contact information for the C&SS Helpdesk and the Yellow Task System Administrator. A red arrow points to the note, and a red box with the text '**NEW**' is located to the right of the arrow. At the bottom is a 'Next >' button.

Figure 2 - If you are a new user to the system, enter your general demographic information before proceeding to the task selection process. Users will only be prompted for this information

one time. The next time the user makes a request the system will recognize the user and the “Requester Information” step will be skipped.

Figure 3 - Use the drop down box to select the appropriate Institute.

National Cancer Institute

U.S. National Institutes of Health | www.cancer.gov

NCI Frederick

About NCI-F Services Science For Our Staff Phonebook

Step 2 of New Request: Requester Information

PLEASE INDICATE YOUR PERSONAL INFORMATION BELOW.

Phone:

Section:

Lab:

Division:

Institute:

Next >

Figure 4 - An Administrative Officer (AO) is assigned to each Institute/Agency listed in the drop down box.

National Cancer Institute

U.S. National Institutes of Health | www.cancer.gov

NCI Frederick

About NCI-F Services Science For Our Staff Phonebook

Step 2 of New Request: Requester Information

PLEASE INDICATE YOUR PERSONAL INFORMATION BELOW.

Phone:

Section:

Lab:

Division:

Institute:

Next >

- SELECT INSTITUTE
- Armed Forces Institute of Pathology
- Center for Disease Control
- Food and Drug Administration
- National Cancer Institute (Select from indented list below)
 - Center for Cancer Research - Bethesda
 - Center for Cancer Research - Frederick
 - Center for Strategic Scientific Initiatives
 - DCTD - Office of Biorepositories and Biospecimen Research (OBBR)
 - Division of Cancer Biology
 - Division of Cancer Control and Population Sciences
 - Division of Cancer Epidemiology and Genetics
 - Division of Cancer Prevention
 - Division of Cancer Treatment and Diagnosis
 - NCI Center for Bioinformatics
 - OD-Bethesda
- National Center for Advancing Translational Sciences
- National Center for Complementary and Alternative Medicine
- National Eye Institute
- National Heart, Lung, and Blood Institute
- National Human Genome Research Institute
- National Institute of Aging
- National Institute of Allergy and Infectious Diseases (Select from indented list below)

Figure 5 - This screen begins the task selection process. For services not listed, select the “other” box at the bottom of the yellow box. Select all services that apply. Depending on your

selections, a template(s) will be made available to you in the next step to assist you with completing your Statement of Work.

Step 4 of New Request: Task Selection, Description, and Files

PLEASE SELECT THE CATEGORY OF YOUR TASK BELOW:

When requesting support resources, please refer to the following links:

- [Example of statement of work](#)
- [Government and Contractor Interactions at NCI-Frederick](#)

Notes

- Requests for services performed by the Pathology/Histotechnology Laboratory should be initiated through the [Accessions System \(CSAS\)](#).
- For Subcontract, Information Management, IT, or General Administrative Support please use the Support Resources Section below.
- Please select all types of support that apply.

Clinical Monitoring
<input type="checkbox"/> Acquisitions and Subcontracts
<input type="checkbox"/> Behavioral Sciences (Behavioral Research Associate, Behavioral Scientist)
<input type="checkbox"/> Clinical Administration / Patient Care Coordination (Clinical Administrative Support, Patient Care Coordinator)
<input type="checkbox"/> Clinical Project Management Support (Clinical Data Analyst, Clinical Project Manager, Special Projects Administrator)
<input type="checkbox"/> Clinical Support (Research Nurse, MRI/PET/CT Technologist, Nurse Practitioner, Pharmacist, Physician, Protocol Nurse Coordinator, Psychometrician)
<input type="checkbox"/> Clinical Trials Management / Regulatory / Pharmacovigilance (Clinical Monitoring, Development of Regulatory and Clinical Trials Program, Regulatory Staff Support, Safety)
<input type="checkbox"/> IRB-DSMB Support (DSMB Secretary, IRB Administrative)
<input type="checkbox"/> Protocol Navigation (Medical Writer, Protocol Navigator)
<input type="checkbox"/> Reduction in Support
Laboratory Services
<input type="checkbox"/> Acquisitions and Subcontracts
<input type="checkbox"/> Laboratory Support (Staffing)
<input type="checkbox"/> Reduction in Support
Animal Services
<input type="checkbox"/> Acquisitions and Subcontracts
<input type="checkbox"/> Animal Holding*
<input type="checkbox"/> Colony Expansion by IVF*
<input type="checkbox"/> Colony Management Support
<input type="checkbox"/> Reduction in Support
<input type="checkbox"/> Technical Support
Support Resources(Acquisitions, Information Management, Administrative)
<input type="checkbox"/> Acquisitions and Subcontracts
<input type="checkbox"/> Administrative
<input type="checkbox"/> Information Management
<input type="checkbox"/> Reduction in Support
Other
<input type="checkbox"/> Other

Notes

- Requests for services performed by the Pathology/Histotechnology Laboratory should be initiated through the [Accessions System \(CSAS\)](#).
- For Subcontract, Information Management, IT, or General Administrative Support please use the Support Resources Section below.

* = Specify the number of cages required to complete project in the description box (Next Step).

[Next >](#)

Figure 6 – In step 5: Indicate whether the work is severable or non-severable. For an explanation of the difference between severable and non-severable, click the “Definitions of Severable/Non-Severable” link below. Complete the description box (required). If you wish to upload a file

(e.g., SOW template) with the description of your request and/or the statement of work, indicate this in the description box with verbiage such as “description is attached” or “statement of work is attached.” The next screen will allow you to upload documents. From your selections in step 4, template(s) will be made available to you. If more than one is listed, select the applicable template(s) to assist you in completing a comprehensive statement of work.

The screenshot shows the 'Step 5 of New Request: Request Description' form on the NCI-Frederick website. The header includes the National Cancer Institute logo and navigation links. The form contains several sections: a text box for 'Project title and/or subject matter' with examples; radio buttons for 'Request Funding Type' (Severable or Non-Severable); a text box for 'Period of Performance' for non-severable requests; and a large text area for 'Description or Comments for request'. Below the text area, a 'NEW' notice mentions downloadable SOW templates, with a list of links: Clinical Monitoring Template, Regulatory and Clinical Trials Template, Regulatory Staff Support Template, and Safety Template. At the bottom, there is a 'Next >' button and a footer with intellectual property information.

National Cancer Institute U.S. National Institutes of Health | www.cancer.gov

NCI-Frederick About NCI-F Services Science For Our Staff Phonebook

Step 5 of New Request: Request Description
PLEASE TYPE THE DESCRIPTION OF YOUR REQUEST/TASK BELOW.

Project title and/or subject matter: (required)
 (examples: caBIG, mouse samples for Meso Scale, PLCO Study, and Clinical Trial support)

Request Funding Type: (required) [Definitions of the choices below](#)
☐ Severable
☐ Non-Severable

For Non-Severable Requests, Please indicate the Period of Performance (in Whole Months)

Description or Comments for request: (required)

NEW: The following template(s) have been made available to assist you in providing a comprehensive statement of work. Please download and fill out the applicable templates and attach them to your yellow task request. Documents, to include templates, can be uploaded in the next step (step 6).

Request SOW Templates (for download)

- [Clinical Monitoring Template](#)
- [Regulatory and Clinical Trials Template](#)
- [Regulatory Staff Support Template](#)
- [Safety Template](#)

Intellectual Property (IP) which may be developed by SAIC-Frederick, Inc., is generally assigned to the United States Government. For additional information or specific questions regarding Intellectual Property, please contact the SAIC-Frederick, Inc. IP Administrator, John Trifone at 301 846-1122 or via email jtrifone@ncifcrf.gov.

Figure 8 - This is the last step of the task selection process. Here you can upload any accompanying documents that you may want to include. You will be prompted to verify your information prior to the actual submittal.

The screenshot shows the 'Step 6 of New Request: Attach Files' form on the NCI-Frederick website. The header is identical to the previous form. The form includes 'File Upload Instructions' with three bullet points: finding files, attaching multiple files, and clicking the next button. Below this, it shows 'Files currently attached to this request' as 'None'. There is a 'File to Upload' section with a text box, a 'Browse...' button, and an 'Upload' button. At the bottom, there is a 'Next >' button.

National Cancer Institute U.S. National Institutes of Health | www.cancer.gov

NCI-Frederick About NCI-F Services Science For Our Staff Phonebook

Step 6 of New Request: Attach Files
FOLLOW THE INSTRUCTIONS BELOW TO ATTACH FILES TO THIS REQUEST.

File Upload Instructions

- Find your file by using the Browse button then click the upload button to attach files to your request.
- You may attach another file after your first file is uploaded.
- When you are done or if you do not have any files click the next button.

Files currently attached to this request:
▶ None

File to Upload:

Repeat User

As a repeat user, there are two options for submitting a request.

- 1) From the requester's homepage, select "Make a new Yellow Task Request." This will direct you to Step Four: Task Selection, Description and Files.
- 2) Select the link "Login to your account" from the yellow task system homepage. Enter your login number and the system will direct you to Step Four: Task Selection, Description and Files page.

If you do not have the login number, click the word "here" underlined in blue in the first sentence. Enter your email address. The system will immediately send you an email with a login number. The email will also include a link to the login screen. Copy and paste the login number. This will take you to the Yellow Task Login Page where you will need to enter your NIH login credentials. From here you can place your request. I recommend bookmarking this link so that in the future you can bypass the initial steps (login number) to get to your account. If you do not have an active NIH email address, please see instructions below in the "Login Information" section.

Request Submission

When a request is submitted, the Requester will receive an email notification with a link to the request. Also included in this email will be the Requester's login ID, which will allow the user to access completed and current tasks, as well as submit new requests. Once you submit the login number you will be asked to enter your NIH login credentials. If you do not have an active NIH email address, please see instructions below in the "Login Information" section.

Login Information

The Yellow Task System requires users to have an active NIH email address in order to access the system. ***You may still submit a new request without an NIH email address, but must obtain one in order to interact with the system beyond that point (view your homepage, review and approve YTs, send emails through the YT System).***

If you do not have an active NIH Email address, please contact the C&SS Helpdesk at (301) 846-5115 or NCI-FHelpdesk@mail.nih.gov and they can assist with this process. If you have any questions contact the Yellow Task System Administrator at YTAdmin@mail.nih.gov.

Yellow Task System Approval Steps

NCI – Contracting Officer Technical Representative (COTR)

The NCI COTR will receive an email notification that a new request has been submitted. This notification will include a link to the new request. The COTR has the ability to use the web-based email within the system, as well as view any correspondence from other participants. The COTR reviews requests for scientific suitability under the OTS contract. For both non-routine and non-severable work, approval is needed by the COTR in order for the request to proceed through the system.

NCI – Contracting Officer

The NCI Contracting Officer will receive an email notification that a new request has been submitted. This notification will include a link to the new request. The Contracting Officer has the ability to use the web-based email within the system as well as view any correspondence from other participants. The Contracting Officer reviews requests for contractual suitability under the OTS contract and for work identified as non-severable, verifies that the work falls into this funding category. For both non-routine and non-severable work, approval is needed by the Contracting Officer in order for the request to proceed through the system.

Leidos Biomedical Research Inc. Yellow Task Coordinator

The Yellow Task Coordinator will be notified by the Yellow Task System four times during the process of a request.

- 1) The Yellow Task Coordinator will receive an initial notification that a yellow task request has been submitted. The request will then be forwarded to the NCI for Office of Scientific Operations and Management Operations Support Branch approvals for non-routine and non-severable work; otherwise, the Yellow Task Coordinator will forward the task directly to the Leidos Biomed Program Area for their review.
- 2) Once the task receives approval from the NCI PO/CO, the coordinator will be notified that it has action required for the task. The coordinator will then forward the task to a Leidos Biomed Program Manager for review.
- 3) The Yellow Task Coordinator will receive another notification requesting approval once the Leidos Biomed Program Manager has submitted a response.
- 4) Finally, once approval has been received by the Administrative Officer, the Yellow Task Coordinator will be notified. For non-severable work requests, the task will be held until the contract modification is received, at which point the Yellow Task Coordinator will input the modification number, amount, and date and approve the task.

Leidos Biomedical Research Inc. Program Manager (Action Person)

The Program Manager will be notified by the Yellow Task System two times during the process of a request.

- 1) The Program Manager will receive an email notification that a request has been submitted and assigned to their program. The Program Manager has the ability to use the web-based email within the system as well as view any correspondence from other participants. A response including any attachments (documents, cost estimates, etc.) will be compiled and submitted to the Yellow Task Coordinator.
- 2) The Program Manager will receive an email notification of tasks that have completed the process and have been approved.

Leidos Biomedical Research Inc. Chief Administrative Officer (CAO)

The CAO will receive the request along with the provided response electronically through the system from the Yellow Task Coordinator. If in agreement, the CAO will approve the response and submit it to the Requester. The CAO has the ability to use the web-based email within the system as well as view any correspondence from other participants.

Requester

The Requester will be notified by the Yellow Task System three times during the process of a request.

- 1) Once a new task has been submitted, the Requester will receive an email containing a link to the task.
- 2) After the request has received the appropriate approvals, the Requester will receive a response to their request. This response will include the proposed approach for completing the statement of work, as well as a cost estimate. If the Requester is in agreement with the Leidos Biomed response, they will select the approval button and submit. This will automatically send the request to the Administrative Officer for approval. If the Requester does not agree with the response, they have the option to disapprove the response or to contact the Leidos Biomed Program Area (Action Person) using the email mechanisms within the task for further discussions.
- 3) The Requester will receive an email notification of tasks that have completed the process and have been approved.

Email reminders are sent to the Requester each week when they have the action on a task. After 28 days without action, the system automatically will disapprove the task.

Note: Use the Yellow Task Web mail link to clarify any questions or issues before disapproving.

Administrative Officer (AO)

The AO will be notified by the Yellow Task System three times during the process of a request.

- 1) The AO will be notified that a request has been submitted. There is no formal action required at this time.
- 2) The AO will receive an email notification upon approval by the Requester with a link to the original request and the Leidos Biomed response. The AO will have the option of approving the response, disapproving the response, or through the yellow task web email system, asking questions or requesting further discussions. For non-severable work requests, the AO must add NBS request number; amount, date, and CAN number to the yellow task before approving the request.
- 3) The AO will receive an email notification of tasks that have completed the process and have been approved.

Email reminders are sent to the AO, with a copy to the Requester, when they have the action on a task. After 28 days without action, the system will automatically disapprove the task.

Note: Use the Yellow Task Web mail link to clarify any questions or issues before disapproving.

NCI – Facility Administrator

The NCI Facility Administrator will receive an email notification that a new request has been submitted. This notification will include a link to the new request. The Facility Administrator has the ability to use the web-based email within the system as well as view any correspondence from other participants.

Request Status

All participants have the ability to check the status of a request by clicking on the link provided in the email notification of a request. The section entitled “Current Step” will provide the location of the step. For example, it might say “Awaiting Leidos Biomed Task Coordinator Approval.” This indicates the request is with the Leidos Biomed Yellow Task Coordinator. The system provides the ability to email the Yellow Task Coordinator within the system.

Requesting Support Using the Yellow Task System
Frequently Asked Questions (FAQs)

How do I know what system to use when requesting services / support?

The services portal located on the NCI Frederick website will guide you to the appropriate system.
<http://ncifrederick.cancer.gov/services/>

How do I check the status of my request?

Click on the link that is provided in the email notification of your request. The section title “Current Step” will provide the location of the task. More detailed status updates are posted within the email mechanism of most tasks. To view the email within each task, click on “For email correspondence for this request click here.” Questions regarding the status can also be directed to the Yellow Task Program office.

How do I change a request or upload additional documents after the Yellow Task has been submitted?

Changes to a request including uploading additional documents can be made using the email mechanism within each task. The email can be accessed through the “Yellow Task Web Mail System” link found on the front page of a Yellow Task request. Note: The email mechanism cannot be accessed through a read-only link. Only users with yellow task homepage accounts can send an email through this system. Users accessing the read-only links can view the email that has been sent through the system.

The AO listed in the YT System is not my AO, why is this?

In the YT System, one AO is assigned approval authority for each division or institute. This individual is responsible to work with the other AOs within their ARC to obtain the appropriate information in order for them to be able to approve the request.